

Message Text

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UNCLAS DUSSELDORF 0629

E.O. 11652: N/A
TAGS: BEXP, GW
SUBJECT: GERMAN FASHION MARKET

REF: ZURICH 0071

1. PARA 4C REFTEL, SUGGESTS COMMERCE CONSIDER SPONSORSHIP OF USA EXHIBITS AT FASHION FAIRS MODEWOCHE (MUNICH) AND IGEDO (DUESSELDORF). BASED ON NUMEROUS DISCUSSIONS WITH VARIOUS SOURCES INCLUDING VERBAND DER DAMENOVERBEKLEIDUNGS-INDUSTRIE (WOMEN'S APPAREL INDUSTRY ASSOCIATION), AND VISITS TO RECENT IGEDO; POST BELIEVES GERMAN MARKET REMAINS UNPROMISING FOR AMERICAN CLOTHING MANUFACTURERS WITH EXCEPTION OF CASUAL WEAR CATEGORY I.E., SWEAT SHIRTS, T-SHIRTS, AND JEANS, FOR THE REASONS STATED IN PARA 2 BELOW.

2. A) GERMAN CONSUMERS SHOW PREFERENCE AS SUGGESTED REFTEL FOR PURE WOOL AND COTTON FABRICS OVER SYNTHETIC BLENDS. (NOTE: GERMAN ACCEPTANCE OF FABRIC BLENDS
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TOLERATED ONLY UP TO MAXIMUM 50 PERCENT POLYAMIDES);

B) PRODUCTION/PURCHASING SCHEDULES OF US MANUFACTURERS DO NOT COINCIDE WITH EUROPEAN COUNTERPARTS. ORDERS SUBMITTED HERE 6 MONTHS IN ADVANCE OF SEASON'S REQUIREMENTS THEREBY ALLOWING EUROPEAN SUPPLIERS MORE COMPLIANCE TIME AND FLEXIBILITY;

C) STYLE, DESIGN, AND COLOR COMBINATIONS DO NOT FAVOR GERMAN FASHION TASTES. FOR EXAMPLE SKIRTS, DRESSES AND COATS TEND TO BE LONGER THAN IN US;

D) QUOTE RELATIVELY POOR FINISHING QUALITY OF US APPAREL UNQUOTE;

E) UNLIKE AMERICAN BUYERS, GERMAN ORDERS TEND TO BE SMALL, RESTING ON CONCEPT OF INDIVIDUALITY AND EXCLUSIVITY OF STYLE.

3. CONVERSELY, GERMAN FASHION TASTES AND PURCHASING/SELLING PRACTICES ARE APPARENTLY NOT WIDELY ACCEPTABLE IN US MARKET. GERMAN MARKET SHARE OF TOTAL US IMPORTS AMOUNTS TO ONLY 1 PERCENT AND FOR ONLY SUCH SPECIALIZED GARMENTS AS LODEN APPAREL, BAVARIAN DRESSES AND SKIING OUTFITS (BOGNER).

4. HOWEVER, US MANUFACTURERS COULD CAPTURE GREATER SHARE OF GERMAN MARKET IN FOLLOWING AREAS:

A) LEISURE WEAR (NOT PROFESSIONAL SPORTS WEAR) AS DEMONSTRATED BY MARKET AND DISTRIBUTION SUCCESS OF WRANGLER AND LEVI JEANS;

B) CHILDREN'S CLOTHING OF HIGH QUALITY. US MANUFACTURERS APPEAR TO HAVE COMPETITIVE PRICE EDGE OVER EUROPEANS.
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C) ACCESSORIES OF ALL TYPES, ESPECIALLY LEATHER.DUX

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